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ABSTRACT

This report describes the best practices identified by eight projects in upstate New York funded to work towards increasing the number of individuals with developmental disabilities who serve in leadership roles on policy boards and planning committees of community agencies and organizations. Programs were based on the model developed by Capabilities Unlimited in Cincinnati (Ohio). The model focuses on bringing together as a TRIAD, persons with developmental disabilities, mentors, and board representatives to participate as partners within community agencies. Participating projects responded to a questionnaire after the first grant year, the community development phase. The community development phase involves planned interventions to induce positive structural changes in the community through citizen participation. Following an introductory chapter, each chapter focuses on a specific segment of the community development phase. Each chapter also closes with a summary of key strategies for future practice. Chapters address: (1) pre-launch activities; (2) outreach; (3) cultivating a cultural role model; (4) keeping the community connected to the process of inclusion; (5) successful outcomes; (6) major barriers successfully overcome; and (7) lessons learned. Seventeen appendices include project letters, resource lists, fact sheets, brochures, questionnaires, job descriptions, and training schedules. (DB)

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PROMISING PRACTICES IN COMMUNITY DEVELOPMENT FOR BOARD INCLUSION: NYS DEVELOPMENTAL DISABILITIES PLANNING COUNCIL'S PROMOTING LEADERSHIP OPPORTUNITIES DEMONSTRATION PROJECT

February 2000 to February 2001

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Chapter One

Introduction

In spring of 1999, the New York Developmental Disabilities Planning Council (DDPC) announced a Request for Proposal (RFP) for Promoting Leadership Opportunities for Persons with Developmental Disabilities demonstration project. The intention of this grant was to increase the number of individuals who serve in leadership roles on policy boards and planning committees of community agencies and organizations based on the innovative model developed by Capabilities Unlimited in Cincinnati. Of those that responded by sending proposals to the DDPC, eight projects all over the upstate New York area were funded to promote board inclusion. They included:

- The Arc of Orleans County at Albion
- The North Country Center for Independent Living (NCCI) at Plattsburgh
- The Access to Independence and Mobility (AIM) Independent Living Center (ILC) at Corning
- The New Horizons Resources Inc. at Poughkeepsie
- The Western New York Independent Living Project Inc. (WNYILP) at Buffalo
- Allegany Arc at Wellsville
- The NYS Institute on Disability (NYSID) at Troy
- *On Board*, at the Center on Human Policy, Syracuse University (This project was funded at least a year earlier than the other seven projects)

What is Board Inclusion?

Board inclusion is a process of promoting true participation of persons with developmental disabilities in decision-making bodies like boards and committees.

The Purpose of Board Inclusion

Board inclusion enhances community representation of persons with developmental disabilities–a strong community taps the strength of every one of its members. Besides, many persons with disabilities are interested in being involved in community organizations in a leadership capacity and they have expertise, assets and experience to contribute to their communities. Of utmost importance is the fact that persons with developmental disabilities need to be part of the bodies that make policies that affect them. The process of including persons with developmental disabilities in decision-making bodies of community organizations assists those community organizations to improve their overall ability to understand, support, and include persons with disabilities in their communities. Furthermore, by undertaking this process boards act as constructive agents for change, thus challenging the status quo.

Four Major Phases of the Board Inclusion Process

According to the RFP there are four major phases to board inclusion:

Phase One – Community Development

Community development refers to a set of planned interventions by the participating community organization to induce positive structural changes in their community through citizen participation. The process involves equipping all concerned with the necessary tools to improve their community. Activities that were carried out included sending out surveys and other outreach mailings to local decision-making groups, hosting workshops at local self-advocates' conferences, and conducting meetings with agency directors and board presidents.

Phase Two – Consumer and Organization Selection/ Matching

Selection and matching involves bringing together as a TRIAD, persons with developmental disabilities, mentors, and board representatives to participate as partners within respective community agencies. Some activities that were carried out in this phase included sending out surveys and other outreach mailings to self-advocates; ongoing identification of interested individuals and organizations; development of individualized selection and matching criteria; and assessment of support available through each decision-making body.

Phase Three – Training

The training phase involves creating a training environment for TRIAD members that will enhance their knowledge of the following: developmental disabilities culture; accommodation needs; board etiquette; Robert's Rules of Order; and so forth. Some of the activities carried out in this phase included developing training curricula; inviting guest speakers; creating interactive group activities; and role-playing.

Phase Four – Technical Assistance

The technical assistance phase involves assisting organizations in making materials and meetings accessible to persons with disabilities; assisting organizations as they help support people and board members to learn about their roles; and assisting organizations in the areas of recruitment and transportation, as well as to overcome any barriers to inclusion that may exist. This phase of the project should continue long after the person with developmental disability commences participation on a board or committee. Some of the activities in this phase included making regular follow-up visits; creating resource materials; making board presentations; and providing telephone consultations with respective boards.

While working with the Person-Centered Transition Planning Resource Center at Cornell University, the DDPC had learned the value of providing funds to an outside program to offer technical assistance and support to a group of related projects. The Person-Centered Transition Planning Resource Center at Cornell University was set up to do the following: provide training for project staff; assist the projects in developing curriculum and training materials; assist the projects in developing relationships and identifying and initiating systemic change; facilitate information sharing and provision of technical assistance for grantees; identify, compile and disseminate identified "Best Practices"; serve as a resource for those who wish to have information on the programs; and to assist projects in identifying and implementing strategies to continue project funding upon the cessation of DDPC funding.

The Technical Assistance and Resource Center (TARC) at Syracuse University

Following the selection of the eight Promoting Leadership Opportunities (PLO) demonstration projects, the DDPC announced the availability of funds to set up a technical assistance and support resource center to coordinate and support these projects. The Center on Human Policy at Syracuse University was successful in securing this grant. As a result, TARC was set up. The TARC staff is comprised of the program supervisor, Bonnie Shoultz, and two project coordinators, graduate students Cheryl Spear and Esther Kabuga. Some of TARC's responsibilities are to:

- Regularly schedule cluster meetings
- Conduct site visits and meetings with individual projects as needed
- Organize and carry out quarterly telephone conferencing
- Coordinate data collection
- Implement individualized technical assistance plans for each project

- Maintain a resource lending library
- Set up training workshops for the projects
- Collaborate with two statewide organizations representing people with disabilities and community human service agencies
- Assist projects in working with organizations, e.g., human service agencies, youth groups or church boards
- Identify, compile and disseminate "Best Practices" on the different phases of the project

This promising practices report is the first "Best Practices Report" and represents the community development phase of the PLO project. At the end of the first grant year, a Community Development Best Practices questionnaire was developed by TARC and sent out to the eight project coordinators in the form of a questionnaire. Responses were primarily gathered by means of self-report in reaction to the questionnaire. TARC's project coordinators assembled and analyzed the information, then organized it into a collection of promising practices.

The Best Practices Report questionnaire was divided into various segments of the community development phase. These segments were then organized into eight chapters and an introduction. Each chapter concludes with a summary of what TARC project coordinators perceived as key strategies for future practice specific to each particular phase.

Chapter Two

Pre-launch Activities

Definition: This refers to activities that were carried out or measures that were put into place before the actual outreach.

Pre-launch activities include any measures that were put in place or events that were carried out by participating agencies before commencing actual outreach to the outside community. Our general observation was that project coordinators and agencies that were already well established in the community in terms of networks and affiliations had the easiest time laying groundwork for the PLO project. This was especially true of projects that already had experience working with persons with developmental disabilities.

The project coordinator for Arc of Orleans County put together a team of strong trainers upfront. As a pre-launch activity she also secured the endorsement for the project from the executive director and other members of the staff of her agency who had a community focused mindset. She did this in order to garner support for the project, which she felt "fit the agency's mission of community involvement by persons with disabilities."

The realization that other community members have the experience, knowledge and willingness to participate in the integration of persons with disabilities into the community is a fundamental one. Not only does it foster responsibility on the part of community members but it also ensures that a project like this one has longevity and can continue long after the funding is gone. Across the board, project coordinators involved various agency staff as well as members of the community in their pre-launch activities. Two words that seem to sum up these kinds of pre-launch efforts well are *networking* and *canvassing*.

The project coordinator for the Promoting Youth Leadership Project at NCCI seems to have utilized networking and canvassing. He gathered support by involving agency staff, parent advocates and other local community members in the generation of ideas on how to carry out the mission of the project. Informational meetings and presentations were also organized for local Developmental Disabilities Services Office (DDSO) counselors, Special Education teachers, and Commission for the Blind and Visually Handicapped (CBVH) counselors.

In a way, projects like this operate like a spinning wheel. In order for all tasks to be sufficiently accomplished, all parts of such a wheel must fit together and complement each other. The project coordinator for AIM ILC understood that without the contributions of other departments within her agency, she and her staff could not carry out her project's goals of inclusion. Therefore she coordinated with her agency's auto transportation program to meet the needs of consumers. Securing transportation upfront solved a problem that was a barrier for most of the projects. It acted as an incentive for consumers to participate in the project. One other project coordinator, understanding that her agency deserved first-hand information about the PLO project, took steps to design a brochure and distributed it throughout the agency.

Two agencies, the Allegany Arc and *On Board*, facilitated the formation of an advisory board and a task force on board inclusion as a foundation to their projects. These advisory bodies made decisions, discussed the issues about the project, and participated in the subsequent outreach activities. Two years before *On Board* was funded, a community Task Force on Board Inclusion was formed. It sent out a survey to agencies in Central New York about their willingness and needs for support to include people with developmental disabilities on their boards. This task force then decided to have the Center on Human Policy apply for funding for the project. Allegany Arc developed an agency advisory board consisting of agency staff, self-

advocates, program staff, and administration to facilitate training and transportation needs. Likewise the project coordinator of this project conducted what we considered as an informal internal survey "with any staff member who had outside community involvement to consider approaching that organization about involvement" with PLO.

Future Key Strategies:

- Begin the project by creating awareness internally through information sharing.
- Seek internal endorsements from all levels of management and staff.
- Identify and mobilize all resources that are available from all persons and departments within the organization.
- Identify community networks and affiliations that the project coordinator and other staff may have that could be useful to the project.
- Create "a mailing list for not-for-profit agencies…" [Capital Leaders Project].
- Gather support and ideas from agency staff, community members, parent advocates and other provider agencies.
- Organize task forces or teams within the organization that will be responsible for guiding and monitoring the progress of the project.
- Evaluate your organization's strengths and deficits in carrying out the project and seek to make up for the deficits.
- Strategize the outreach phase of the project and prepare all outreach materials.
- Submit periodic proposals for conferences like the statewide Self-Advocacy Association.
- Look to agencies with representation of persons with disabilities on their board for examples.

- Build a basic resource library at your agency.
- Set up fiscal record-keeping system for the project.
- Make presentations about your project at central agencies such as the DDSO, Committee of Executive Directors, Staff of Independent Living Centers, New York State Independent Living Council, Inc., self-advocacy groups, etc.
- Set up a simple listserv for agency and community members.
- Put project information on agency website and make website address available to others.
- Always remember that other community members often have the experience, knowledge and willingness to participate in the integration of persons with disabilities into their communities!

If a majority of these key strategies are put in place, transitioning the project into the next phase of outreach should be a relatively easy process. Not only will the community organization be geared up internally, but necessary and valuable contacts will have been established in the community. These preparatory steps will allow project coordinators to tap organizational resources for carrying out outreach activities as well as to have the necessary support in doing so.

Chapter Three

Outreach

Definition: Outreach is the process of getting the word out or creating awareness about the project. In addition, it describes the important connections made following the pre-launch phase.

Beyond their pre-launch activities, PLO Project Coordinators (PCs) had to think about their next crucial steps. Issues that surfaced during the outreach phase included effective strategies to make connections with diverse communities and their members. Thus, one challenge involved providing education and resource materials for interested community members. For example, the PC of Arc of Orleans County began her outreach efforts by first using her position as a community leader to connect with other community leaders within her "close-knit rural area." She solicited their support and participation for the PLO project. As this project coordinator noted, connecting to her peers "produced positive responses" as did her community leadership roles, which included running a Day Habilitation program and her position as secretary of the Chamber of Commerce.

PCs used other effective strategies to connect to their target organizations. Knowing that involvement with the local school district officials would be a bureaucratic process, the NCCI PC decided to go "directly to the schools." He said, "We met with school administrators and teachers to inform them about the project. Once we had a teacher to help in a specific school, mailings were sent to parents. Then, they met with various classes to tell them about the project." For this coordinator of NCCI, outreach efforts continued with the distribution of information leaflets handed out and mailed to those interested. As noted, this PC's efforts resulted in securing "sufficient referrals of students to fulfill the project goals."

Encouraging and preparing outside community agencies to get involved were notable outreach strategies embraced by the PLO PCs. To be sure, the prospect of getting agencies to envision and participate in the project of board diversity called for an array of approaches. For instance, the PC of Access to Independence and Mobility (AIM) felt encouraged to focus her attention on public relations activities. In this respect, she placed announcements in local newspapers, newsletters, and service clubs (e.g., Lions Club & Rotary Club). Specifically, she felt that she could reach local community members and agencies through placing notices with "human services agencies" as well as "within their agency's own newsletter." As well, the PC "featured [the project] on an AM Radio talk show..."

To take the public relations activity a step further, the PC of Leading the Way from WNYILP engaged various members of her community in frequent dialogues, seeking and gathering information through planned presentations and workshops on inclusion and community membership at local conferences and agency staff meetings. She also engaged her listening, and we might add, invisible audience(s) through "interviewing with the Independent Perspective radio and TV shows." Like the PC for AIM, this PC gave particular attention to reaching large audiences through "public service announcements and press releases." Specifically, "surveys were mailed to 220 local not-for-profits working with people with developmental disabilities. Mailings went to policymakers...traditional agencies for persons with developmental disabilities, planning councils...and cultural and consumer organizations."

However, Allegany Arc took a different route to reach community members. The PC incorporated what we believed was a team approach. For instance, he "sponsored a Speak Out for self-advocates." As well, he brought staff together to sponsor a full day of training for community organizations with Capabilities Unlimited, a private non-profit organization

committed to the inclusion of all people, with or without disabilities, to reach their full potential in their communities. One other outreach activity that was used by several projects was an informal community brunch to promote increased interest in leadership opportunities for persons with developmental disabilities. In keeping with standard outreach strategies used by agencies mentioned above, Allegany Arc reached out to community members through "newspaper announcements, radio, and surveys."

Another PLO project, *On Board*, presented the project to a placement consortium (a consortium of supported employment agencies). They also conducted outreach through the creation of a newsletter. As well, the Capital Leadership Project made presentations at the "State Rehabilitation Council, DDSO Advisory Council…New York State Independent Living Council, Inc." Another form of outreach, undertaken by the Capital Leadership Project, was "announcing the project at the NYSID website." These avenues of outreach served to expose their project and increase potential participation.

Future Key Strategies:

- Start your outreach by talking to community members and organizations that you regularly associate with.
- Solicit ideas for outreach from members of the community and other agency staff.
- Solicit consumer and board participation through surveys.
- Utilize formal and informal referrals to solicit host boards and consumers.
- Encourage the participation of community members and organizations through public relations activities (e.g., informal community brunches).

- Utilize regular media outreach (e.g. local radio and television, local newspapers, community organizations' newsletters, community notice boards, and local and statewide organizations' websites).
- Make your outreach efforts through media that is generally accessed by the target consumer population and providers.

Chapter Four

Cultivating a Cultural Role Model

Definition: An organization's explicit efforts to adjust any skewed values, norms or practices toward persons with disabilities that might exist in its daily operations. These efforts may include confronting any prejudices, stereotypes or biases toward persons with disabilities.

Organizational culture is perhaps the greatest barrier to inclusion as it often presents prejudices and negative attitudes that act as barriers to the integration of persons with disabilities. Organizational culture can be described as the working structure of an organization, or simply put, the way things are done in an organization. It encompasses the shared beliefs, values, norms and practices that are operating both consciously and unconsciously within an organization.

In order for an organization or community agency to cultivate a cultural role model, it must first examine the existing culture and then initiate changes toward the desired culture. Deliberate steps must be taken to adjust skewed values, norms and practices by forming a fresh, common vision and direction, developing objectives on how to achieve that at various levels of the organization, modeling behavior that supports the new vision and continually dialoguing within the organization. This desired culture then serves as an example to other community agencies.

In asking the question about how to cultivate a cultural role model, TARC assumed that agencies working with people with developmental disabilities would work to demonstrate behaviors and actions that focused specifically on issues of inclusion. In the community development phase of the PLO project, different agencies carried out different activities to cultivate cultural role models.

At least half of the projects included persons with developmental disabilities on their own board, a strategy for role modeling inclusion. Many projects reported having purposefully engaged interactions with persons with disabilities. Additionally, agencies made available positions on their boards and board designated committees so that persons with developmental disabilities could participate in their decision-making processes. Several agencies became involved in awareness raising forums, informational forums, conferences, workshops, and team meetings that dealt specifically with persons with developmental disabilities and those issues and concerns relevant to the integration of these persons into their communities. Notably, a majority of the projects enabled people with developmental disabilities to participate in activities that have typically been out of their reach (e.g., decision making and leadership).

In an effort to model inclusion, the project supervisor of *On Board* helped to form a community Task Force on Board Inclusion comprising members with various disabilities. *On Board* also utilized a man with a developmental disability as a consultant to the project on a weekly basis. The first PC had a good relationship with a co-trainer, who is also a person with a disability and staff member at the Center on Human Policy. Additionally, *On Board* involved staff from a statewide organization, Grassroots Regional Organizing Program, in the Task Force on Board Inclusion. The *On Board* project staff also attended self-advocacy meetings and conferences on a monthly basis. Recognizing that transportation is a major barrier to community development, some members of the *On Board* staff are currently working with other members of the community to improve the transit system.

The NCCI's Promoting Youth Leadership project involved high school students with disabilities in a variety of community interactions. These included the classroom, the Government Center, hospitals, the YMCA, the Cart Bus and other local community settings.

Clearly, Allegany Arc took seriously the responsibility to model inclusive behavior. This agency sought to increase consumer participation and voice internally through the development of an agency advisory board. This board "assisted and attended all community forums." The project held bi-weekly meetings, which allowed for training and guest speakers to interact with all project participants.

The PC from WNYILP role modeled for her agency the idea and practice of teamwork and empowerment. She did this through providing an opportunity for the program participants to use negotiating, fundraising, and organizational skills as they solicited monies for their graduation ceremony.

At the Arc of Orleans County persons with developmental disabilities were routinely involved in decision-making processes (e.g., participating in interview teams for hiring Arc staff). The day habilitation program at the Arc of Orleans County provided consumers with volunteer opportunities in the community. These opportunities for volunteerism provided excellent experience for future board and sub-committee involvement.

The NYSID recognized the need to acknowledge consumers as the focus of their project. Rather than going through other organization staff to outreach to consumers, NYSID marketed their project directly to the individuals with developmental disabilities. Moreover, NYSID developed a handbook "which boards can use as a training tool."

Future Key Strategies:

- Do not be afraid of initiating organizational change.
- Be the cultural role model for your organization and community.
- Be an advocate for persons with disabilities and encourage your organization to do the same.

- Encourage purposeful interaction between the organization and persons with developmental disabilities.
- Empower the consumers to participate in activities that were previously out of reach for them (e.g., interviewing incoming agency staff).
- Think beyond the project and initiate inclusive behavior that extends beyond the lifespan of the project.
- Involve other community members in the efforts to cultivate a positive cultural role model.

Chapter Five

Keeping the Community Connected to the Process of Inclusion

Definition: This refers to the ongoing active process of maintaining regular contact, listening and providing feedback between the host board, project participants (students), and other community members and organizations.

An ideal community development initiative is one that has longevity and ongoing enhancement. Community initiatives keep the community connected to the goals of inclusion through regular contact, listening, and provision of feedback. This contact must be active rather than passive. PCs need to constantly find new ways to keep the community committed to the goals of inclusion.

On Board kept the community connected through a newsletter and a website devoted specifically to the project's activities. Follow-up telephone calls to organizations and interested individuals were made on an as-needed basis. In order to obtain more community feedback, *On Board* has added new community members to the Task Force on Board Inclusion.

The Capital Leaders project at NYSID opened up their training to mentors and community members so that they could understand how best to work with board members who had developmental disabilities. The project leaders also spoke at various community events, and handed out a flier about their project to various agencies. The leaders of this project realized the need for open dialogue with community members and members of agency boards and committees. During the community events that they attended, they deliberately asked open-ended questions such as, "What are your concerns about having a person with a developmental disability on your board of directors?" These types of questions led to productive discussions

about the importance of inclusion; possible accommodations for board members with developmental disabilities; and support that the project could provide to the host board.

The WNYILC made it a point to maintain open dialogue both within their agency and with the external community. Telephone calls; bulk mailings of the project's cover letter, survey, and brochure; press releases to TV, radio stations and newspapers; and interviews about the program were some of the ways this project used to keep the community connected to the goals of inclusion.

The Arc of Orleans County appreciated that the community could only be kept connected by being actively involved with the project. In this endeavor, the PC "kept the majority of the responsibility in the hands of the consumers and their mentors" but met with them monthly to problem-solve. The PC made telephone calls "to assure communication on the date and time of future meetings" so as to use this as an opportunity to "ask how the match is going from the matched agency's point of view."

The NCCI recognized the importance of face-to-face meetings with the community members. They organized such meetings with schools and other community organizations. Additionally, handouts and mailings were done at the beginning of the project. For more far-reaching connections, a message board was launched on the Internet to enable youth with disabilities to dialogue about leadership with other youth nationwide. NCCI hopes to soon launch another community message board to facilitate discussions about inclusion in organizations. At the onset of their second year, NCCI developed a survey that would be completed by participating students and teachers to give their input as to how the project should proceed. Advice on how to direct the project was sought from DDSO counselors, teachers and parents on an ongoing basis.

AIM understood that consumers must first and foremost be satisfied with the program before the external community could be evaluated. As such, they conducted focus group meetings to assess the progress of participants throughout the training period. A pre-test and post-test was administered to assess participants' progress. Feedback questionnaires and evaluations were completed by students after each training session to assist the PC to improve future training sessions. During the training sessions, participants were also asked for suggestions and improvements they might find helpful.

Future Key Strategies:

- Talk with project participants (students) to determine their needs, experiences and desired outcomes.
- Use multifaceted methods of seeking information from, and providing feedback to the community.
- Perform regular telephone or face-to-face follow-up with participants, host boards and support persons to provide accommodations and evaluate quality of placements.
- Use questionnaires and evaluations to obtain feedback from project participants and other community members.
- Encourage open dialogue and address any concerns that board representatives might have about the participation of a person with developmental disability on their board of directors.
- Involve mentors and other community members in the training sessions in order to help them understand how best to work with persons with developmental disabilities.
- Be creative!

Chapter Six

Successful Outcomes

Definition: This section focuses on a quantitative overview of reported community connections as well as relationships secured with the target population (e.g., it reflects each agency's aggregate number of agencies contacted or number of consumers recruited).

Within the first year, PCs, their staff, and consumers had begun to create solid plans of action that would positively shift barriers within their projects. For example, barriers common to projects like time and budgetary constraints, inadequate transportation access, and lack of community education about disability in general served to threaten the efficacy of PCs' vision. How PCs found ways to shape their projects constituted a major success that has implications for the future. For example, PCs found creative ways to make activities happen in spite of time pressures particularly for most coordinators who worked part-time. Additionally, they stretched monetary resources to fit conservative budgets. As well, they helped to raise community awareness about the gifts and talents of persons with developmental disabilities, thereby helping to minimize negative attitudes. And finally, they secured transportation from various resources to get participants to and from project activities as they brought the Community Development phase into focus.

To that end, successful outcomes described within this report reflect a quantitative overview of established community relationships rather than a qualitative analysis. Such a qualitative analysis, we believe, can only be made after PCs have had time to settle in with their projects. In such case, Community Development, the first step in the PLO process, included the number of agencies project leaders contacted when utilizing the most common outreach strategies; the number of people recruited at different points within this phase; and the aggregate

number of people who participated in the individual projects (service providers, mentors and persons with developmental disabilities). Examples given below show this quantitative focus:

In the case of *On Board*, they report having worked with 28 individuals with disabilities in 2000 and 14 individuals with disabilities in 2001. They also identify making contact with 42 providers in 2000, and 55 in 2001. "Six individuals with developmental disabilities have been included on boards or committees."

The Promoting Youth Leadership Project at NCCI, while intending to work with more than one school, has "successfully interfaced with one high school" in their community. In this school environment they report having "established a strong relationship of mutual trust and respect." The efforts of NCCI's PC have resulted in the recruitment of 15 students. Furthermore, this recruitment has opened the door for these students with disabilities in multiple community organizations. The PC emphasizes: "students have undergone leadership training and participated in community organizations such as the YMCA and Club Adrenaline, a local teen establishment. Our students have shown varying degrees of leadership by conducting meetings with school administrators, planning field trips, forming and running their own clubs, and participating in local organizations. "

For Leading the Way, "of the 220 agencies solicited we received a 10% return." Thus, this PC was successful in "making contacts with 20 agencies and securing commitments for 11 students and two guest participants in class activities." AIM, another PLO, reports that they "canvassed [a total of] 60 agencies." As well, they "graduated 8 individuals of the initial 11 candidates." Also, AIM was successful in placing 4 of their 8 graduates on boards or county legislative committees.

Within the Arc of Orleans, they report that their agency has "six of the initial eight participants actively attending meetings within their matched agencies." Furthermore, this agency's PC reports these placements resulted in "a great deal of satisfaction" for the participants.

The Capital Leadership Project also reports contacting large numbers of community members about their project. For example, they made presentations about the project to over 45 directors of human service agencies and Independent Living Centers.

Chapter Seven

Major Barriers Successfully Overcome

Definition: This is a description of challenges and potential problems that were satisfactorily overcome by different Promoting Leadership Opportunities projects.

When PCs wrote about the barriers that were successfully overcome, they used a qualitative tone. They described both challenges and problem-solving strategies used. For example, *On Board* faced a barrier that was common to all agencies: securing transportation for students with developmental disabilities to attend ongoing trainings. To solve this problem, *On Board* received a supplemental transportation grant from an outside source in their first year. To meet the second year's expenditures for transportation, *On Board* budgeted directly through their DDPC (Developmental Disabilities Planning Council) grant. In addition, the *On Board* staff, along with members of the Syracuse community, remained active in working with transit system officials to seek improvements in public transportation schedules, thereby increasing overall access to persons who do not drive. Similarly, the Capital Leadership Project says, "our problem experienced was transportation. Two participants received transit tokens to defray the cost of using mass transportation, and transit system." In order to get all students to meetings and trainings, students also traveled by taxicab.

Another barrier that was common to all agencies was the recruitment of mentors to support students with disabilities who desired to participate on boards. In attempting to solve this problem, AIM discovered several ways to solicit mentor participation. For example, they sought support both within and outside the agency. Externally, they sought mentors from volunteer organizations and from student learning and support centers at a local community college. Internally, they utilized AIM's Job Coaching Service to act as mentors. Here, the PC gives

important advice: "Provide clearly defined roles of the mentor and for the agency" and equally important, discuss "what the actual time commitment will be." Finally she says, "get commitment up front." Two other agencies, until they could find "natural supports" (i.e., friends, family members, or members of the board), utilized agency staff to provide this support to those students who would receive leadership training.

Aside from these two common barriers faced by project leaders (securing transportation and mentors), other problems that existed were specific to the particular agency. One troublesome barrier dealt with strategically was filling in for a PC who left the project without much notice. At this agency, "the Executive Director, ILC Coordinator, and the Staff Peer Advocate...work[ed] together on the project." Another barrier cited by a good number of the projects was "getting agencies who agreed to participate to return calls..." Several solutions came about: (1) make face-to-face contacts, (2) establish a permanent contact person, and (3) send out self-addressed envelopes.

For NCCI, a barrier that continued to challenge them was moving through bureaucracies. They tell us that "one of the biggest challenges we faced was getting established in a school. Although everyone we talked to thought the project had merit and would benefit their school, we had difficulty finding teachers who would devote some time and effort to the project." In order for NCCI to convince the administrators, teachers, and students of the importance of youth leadership training for high school students with disabilities, NCCI had to make the leadership trainings "available as a supplement to the education going on in the school setting." In reporting the success of this strategy they note, "we have built a strong partnership with the high school and now have a team of youth who are beginning to show signs of commitment."

The goal and challenge of NYSID's Capital Leadership Project was to reach the greatest number of persons with developmental disabilities and agencies to participate in their leadership projects. NYSID explains, "It takes a lot to get the word out to every agency." Thus, their strategy was to get the DDSO and the Self-Advocacy Association of NYS Inc. to help them promote the project. In order to raise awareness about community membership for persons with disabilities, PCs were required to make multiple attempts at problem solving since they realized that "agencies did not always understand what they were talking about." Yet, PCs felt that their ideas and practices of inclusion would prevail. PCs held firm under barriers and produced successes knowing that progress made does in fact lose its forward movement and that new staff come and more often they go. They also courageously held firm knowing that administrations unexpectedly change hands, and so do policies and procedures, and that, allocations of monetary resources shift between unencumbered spending to a dry-up of funds.

Future Key Strategies

- Be creative!
- Create a line item in project budget for paying or sharing cost of transportation with student to help defray their expenses.
- Establish a permanent contact person for all correspondences.
- Make as many face-to-face meetings as possible.
- Send out self-addressed return envelopes.
- Make use of business cards.
- Explain the role of the mentor, discuss time commitments, and get commitments for assigned mentors up front [AIM].

- Design an accessibility checklist both for the organization carrying out the project and for potential host boards/organizations.

Chapter Eight

Lessons Learned

Definition: These are valuable lessons that could guide future practice and that have potential to be developed into best practices.

The inclusion of persons with developmental disabilities into decision making bodies within their communities is in itself a systems change process. The challenge to shift the current structure whereby decisions that directly affect persons with developmental disabilities are made without their participation and input is an enormous one. Following the community development phase of the PLO we became keenly aware that such a change in structure involves the re-shaping of the physical boards to include the presence of people with different abilities and the re-articulation of a philosophy that includes voices of all board members. These actions result in the development of a policy that reflects the new mission and evolving culture of the community organization.

Furthermore, the future of systems change depends to a large extent on the lessons learned by participants, project coordinators, community members, and other staff of community development agencies that are involved in this process. All the PLO PCs learned valuable lessons, which can guide future practice.

On Board learned that it is crucial for projects that are involved in systems change to stay connected with the community in as many ways as possible. *On Board* purposely made their connections with the community multifaceted. For example, the Task Force on Board Inclusion, mentioned elsewhere in this report, was successfully brought together. Staff members and parents were used as resources for getting the message out about the program. In order to chip away at the negative attitudes that organization staff and volunteers still have towards people

with developmental disabilities, *On Board* chose to engage in continuous dialogue about attitude change. *On Board* reported that, although they have not overcome this problem, they learned that persistence is the key.

During the first grant year AIM ILC had relied on activities such as putting up notices, creating agency lists, and/or placing announcements in newsletters to get the word out about their project. These activities were hardly interactive with the community and/or consumers. From this, a valuable lesson was learned, namely that it is imperative to develop stronger community presence by engaging in interactive activities. AIM reported a desire to improve their approach during the second grant year. AIM realized that to accomplish this would mean extending their project beyond "anonymous" activities. It would mean making themselves visible as an agency for community interactions, and becoming identified as role models, educators, and trainers, and, more importantly, as community members. As the AIM PC noted in a self-report, "we would like to do more in the second year of our grant with board trainings on diversity and interacting with persons with disabilities."

The coordinator for WNYILC learned the importance of employing professionalism and maintaining a high optimism in all phases of the project. She only saw possibilities rather than focusing on barriers and this guided the way she communicated to her agency's staff, the consumers and the external community. Whenever TARC staff spoke with her, she only spoke of positive outcomes and possibilities. In this way, we learned from her that the PLO project was to be treated as professional business at all times. One of the ways she demonstrated her professionalism was through an intensive focus on publicity and public relations for the external community. She emphasized the importance of details such as the aesthetics on brochures and other stationery that was mailed out to the community.

The coordinator of NCCI emphasized two important lessons learned through his experience with the Youth Leadership Project. The first lesson NCCI learned was the importance of establishing partnerships with existing and long-standing institutional structures (e.g., the school district and the School to Work Program) in order to overcome bureaucratic barriers that might otherwise have hindered the project. Of equal importance, NCCI learned the virtue of flexibility in community development. They put this into practice by taking the project to consumers who were high school students in the School to Work program. In this program, participants were already gathered, and there were reduced barriers to participation. When the PC had tried to have the project operate from outside the school setting, students had shown unwillingness to use up their leisure time to participate in the program.

The PC of the Capital Leaders Project at NYSID paid special attention to the lessons she could learn from members of the Self-Advocacy movement. To this end, she reiterated the importance of gathering consensus for her training through small focus groups and conference workshops. Making use of dialogue with those community members who have already participated in the process of inclusion meant that she could stay connected to the "larger, more established organizations."

Necessary to achieving cohesion within Allegany Arc's project was conducting "regularly scheduled meetings" and ongoing training for self-advocates through the *VOICE* Advisory Board. The success of their project also hinged on other educational forums with trained presenters from Capabilities Unlimited as well as maintaining consumer voice on their own board through the creation of the *VOICE* Advisory Board.

In keeping with the original intent of the DDPC RFP the PC for the Arc of Orleans County utilized the TRIAD method. Her approach helped to keep the training more specific and

focused on the needs of the particular host board. She learned that making matches before beginning training is "absolutely CRITICAL." In her own words,

> Having a match gives an individual with a disability and the mentor a reason and focus for attending. All the agencies need to do is to agree to the concept and if possible supply a mentor. They won't see the person until the training is over, so there is time to get used to the idea of a new person on the board, and make any necessary accommodations. The training is then more powerful as you review the mission not of some generic agency, but the one you will actually be working with. All examples can be geared toward the actual situation the person will be going into. It takes it out of the theoretical "someday when I find a board I want to be on" to "wow, I'll need this next month when I start attending Literacy Volunteer meetings."

Another approach that the PC for the Arc of Orleans County reflected upon was the level of community involvement from her own staff and even those not directly working on the project; she believed that her staff should be regularly involved with local community activities. She learned that self-advocates who volunteered in the community could gain "excellent experience for future board and subcommittee involvement."

Overall, many lessons were learned about positive strategies and barriers to engaging effectively in such a community development effort. It was especially important for PCs to reflect on the lessons that they had learned because: this helped them to evaluate what their projects had accomplished; what still needed to be accomplished; what challenges they had successfully overcome; and what challenges still needed to be overcome. Hopefully, the experiences of these project coordinators will provide useful lessons to guide future practice. Furthermore, individuals and organizations that are involved in the process of developing their

communities could replicate some of the strategies that these project coordinators found to be positive.

Future Key Strategies:

- Intensive outreach and mobilization of internally available resources form a good foundation for the community development process.
- The project must stay connected with the community in as many ways as possible.
- Staff members, parents, and self-advocates are good resources for outreaching for the project.
- Be persistent in lobbying for attitude change towards persons with disabilities.
- Think beyond the confines of the project, seeking to initiate changes up to the legislative level.
- A strong community presence is crucial for the success of the project.
- Employ professionalism and maintain optimism in every phase of the community development process.
- Entering into partnerships with established institutional structures and community organizations may help to overcome barriers and bureaucracies that might have otherwise been encountered.
- Flexibility is necessary while carrying out community development.
- Dialogue with organizations and community members who have already participated in the process of inclusion is helpful.
- Utilize trained and/or experienced presenters who have experience working with persons with developmental disabilities.
- Allow the project participants (i.e., the persons with developmental disabilities), to

participate in the generation of ideas for the project.

- Encourage persons with developmental disabilities to get involved in other community activities through volunteerism.
- Matching the consumer to a specific board upfront allows for preparation to be more focused.
- Working with fewer numbers at first seems more effective and provides better models for future community development initiatives.
- Think long-term; think beyond boards and committees; think beyond the project's lifespan.
- Remember that the process of inclusion is long-term and it requires much sacrifice, time and resources!

Conclusion

Our goal in this report was to highlight critical strategies employed within the PLO. Keeping to this task, we reiterate those practices most often used by PCs. The TRIAD approach, mentioned within the introduction, was clearly DDPC's preferred method for establishing inclusive practices of board participation for persons with developmental disabilities. If, in fact, groups of TRIADs could have been developed (i.e., bringing together, simultaneously, the consumer, mentor and board member) as one, then philosophical and practical standards for community inclusion would have been easily resolved. The TRIAD approach, we learned, required of PC's unanticipated resources (e.g., like additional work hours, as well as, community supports) that made this approach difficult to implement.

Yet, what we have outlined here as options to the TRIAD approach, those practices taken on by individual PCs have been equally effective in increasing the presence of persons with developmental disabilities into community decision making bodies. Thus, PCs' strong push for internal agency supports became the "foothold" for learning how to engage their communities. To that end, we have attempted to list future key strategies at the end of each chapter for consideration in moving one's project beyond the pre-launch (internal) phase into that of the community outreach, education and response.

Outreach strategies taken up in Chapter three, were in part individually crafted. In this way, they were varied. As we cited throughout, face-to-face encounters proved most effective in bringing about community response. Also effective in getting the word out were public relations activities like bulk mailings, electronic communications (e.g., web-based developments), and radio and television presentations. Clearly, any one of these outreach strategies used in isolation would have proved ineffective.

PCs who were most effective during their outreach phase, we noted earlier, worked through apparent values, beliefs and practices, first, within their own agencies. Thus, they created what we have termed cultural role models for community awareness and inclusion. Critically, these agencies created spaces within their own boards or committees for those persons with developmental disabilities for whom the PLO project was meant.

Keeping the community connected to the goal of inclusion took several forms, one of which was reinforcing both pre-launch and outreach key strategies. Another was reminding host boards of their commitments to the goal and assisting consumers and boards with concerns for appropriate accommodations.

The phase we have just discussed (the Community Development phase) covers the span of a little over a year. We cannot yet address the quality or longevity of community relations established by project coordinators. Certainly, each step taken within the Community Development phase overlapped and thus, reinforced each project's level of stability as they progressed. Thus, in year two, PCs will have achieved success as they complete the training and matching of consumers to community boards of consumers' interest.

In closing, we would like to acknowledge that more effort has been made and continues to be made than was captured in this report. As the Chinese say, "the journey of a thousand miles begins with a single step." This is to suggest that such an undertaking as the PLO project required a huge effort for changing attitudes, changing agencies' cultures and changing systems. Therefore, many of the tasks that project coordinators attempted may not have been identified as best practices in this report and yet they were critical steps taken in laying the groundwork for future community integration.

APPENDICES

1. North Country Center for Independence - Youth Leadership project's letter to parents.
2. Community Development Best Practices Protocol - Used to solicit information on phase one of the project.
3. Board Inclusion Resource List - A list of publications on board inclusion.
4. *On Board* Fact Sheet - Resources for Building Inclusive Boards and Committees.
5. *On Board* Survey of Decision Making Bodies- Board profile.
6. *On Board* Fact Sheet - A Curriculum for Learning to Serve on Boards and Committees.
7. Lead the Way program Brochure - Western New York Independent Living Center [WNILP].
8. Promoting Leadership Opportunities for Persons with Developmental Disabilities - Project flyer for Access to Independence and Mobility ILC [AIM].
9. Board Inclusion - Brochure on the process of board inclusion and the Promoting Leadership Opportunities projects by Technical Assistance and Resource Center [TARC].
10. *VOICE* Advisory Leadership Project Questionnaire Survey - Allegany Arc's board profile.
11. *VOICE* fact sheet - About VOICE consumer advisory board.
12. Public Service Announcements - WNILP.
13. Tips to keep in mind when working with an individual with developmental disability - NYS Institute on Disability.
14. Job Description for my Support Person - NYS Institute on Disability

15. DDPC Leadership Training Schedule - Arc of Orlean County's training curriculum

16. Meetings Topic Schedule - *On Board's* training curriculum.

17. Notes for Meetings #3 & #4 - Questions to Ask Boards and Yourself Before Joining - *On Board.*

NORTH COUNTRY CENTER FOR INDEPENDENCE

102 Sharron Avenue • Plattsburgh, New York 12901
Voice & TDD (518) 563-9058 • FAX (518) 563-0292
Website: http://pages.slic.com/ncci/home.html • E-mail: ncci@slic.com

YOUTH LEADERSHIP PROJECT

A One-Year Pilot Project

The Youth Leadership Project will focus on high school students with developmental disabilities in three school districts in Clinton County, New York. The objective will be to assist at least 9 youth with disabilities to be fully participating members of school and / or community-based youth organizations. Of this number, at least 4 will also assume leadership roles within their organizations. These outcomes will have the following benefits:

• Youth with developmental disabilities will gain real-life experience of working cooperatively in groups, leadership, assuming and fulfilling responsibilities, and serving others. This experience will improve their chances for independence, integration, and productivity later in life.

• Participating organizations will become more receptive to people with developmental disabilities.

• Significant segments of youth culture, both in the school and in the community, will be more accepting of youth with developmental disabilities.

NCCI will seek participation from a wide variety of organizations in high schools and in the community at large. Such organizations may include, but will not be limited to:

• Student government,
• Special interest and pre-professional student clubs,
• Competitive teams (sports, debate, academic competitions),
• Youth-oriented service organizations (Civil Air Patrol, Boy and Girl Scouts, 4-H),
• Religious organizations (church / synagogue boards, committees, youth groups).

An important component of this project will be the formation of a community group forum made up of representatives from such school and community groups. This forum will, as a group, provide input to and analysis of the project's implementation and receive training and technical assistance on accommodating youth with developmental disabilities.

Participating students will be sought and selected in collaboration with DDSO case managers, school personnel (teachers, counselors, administrators, etc.), and families. A specific effort will be made to collaborate with Committees on Special Education and Building Principals and work out agreements to permit project staff to interact with students on school grounds during all phases of the project.

The Youth Leadership Project is funded by a one-year grant from the Developmental Disabilities Planning Council.

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United Way of Clinton and Essex Counties

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April 4th, 2001

Community Development Best Practices Protocol

(Community development refers to a set of planned interventions by groups, agencies or institutions to induce positive structural changes in a community through citizen participation. The process involves equipping all concerned with the necessary tools to improve their community).

1. Briefly describe any **pre-launch activities** that were undertaken_____

2. Describe any activities you carried out in order to build **internal organizational support** (internal organizational support refers to the collaborative efforts among staff within an organization)

3. a) **Who**, in your organization, was involved in the Promoting Leadership project?

   b) What efforts were made to **create a positive network of conversation** about the project with peers? _____

4. Briefly describe **outreach activities** that you carried out in order to create awareness about your project. For example, informational breakfasts, radio announcements etc.

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5. What did your organization do to **cultivate a cultural role model** for other community agencies and their boards? That is,

   a) Did your team purposely **interact with persons with developmental disabilities** that you were serving? How often and in what settings? _____

   b) Did your organization **include a person with developmental disability on your board?** _____

   c) Did the team or individuals involved in the project **attend key conferences or forums and training sessions about board inclusion?** _____

   c) What other things did your organization do? _____

6. What did your organization do to **keep the community connected to the goals of inclusion** (examples might include newsletters, electronic mail, ordinary mail, telephone calls etc). Include details about how often these were done and sample copies of items like newsletters, surveys, etc. _____

7. Briefly describe any **successful outcomes** of your community development phase (For example: How many community agencies, persons with developmental disabilities were recruited?) _____

8. Describe any **major barriers** that your organization **successfully overcame** in the community development phase _____

9. Describe any kind of efforts that your organization made to ensure that **listening** to or **feedback** from the community was done _____

10. What **valuable lessons**, if any, did your organization learn that can be replicated in future?_____

11. Anything else that you think should be included in our community development best practices report? _____

Feel free to attach extra pages if you need to.

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Publications About Board Inclusion:

Gobel, Susanne (1995). **Not Another Board Meeting!** Manual.
For information or copies:
Oregon Developmental Disabilities Council
540 24th Place, NE
Salem, Oregon 97301-4517
(503) 945-9941
or (in Oregon only) 1-800-292-4194

for consultation or technical assistance:
Jill Flynn
Oregon Developmental Disabilities Council

Summary:
This spiral-bound manual is divided into four major sections. The first section contains introductory material including suggestions for using the guide, a one-page list of terms that might be encountered by someone participating on a board, and a resource list. The remaining three sections are the guides for self-advocates, support people, and decision-making groups. Each contains a one-page list of suggestions for using that section, forms that have questions for the user to ask, and ideas for working with others. Each ends with a short vignette that shares the perspective of a person from the group to whom the section is directed.

The information in this manual is presented in an easily understood manner. The questions on the forms are presented in boxes on the left side of the page and space (and lines) is left on the right side of the page for the user to write in answers. Each section of questions leaves blank boxes for the user to fill in with her or his own questions. Ideas sections are bulleted and main points in each sentence are in bold print. The stories at the end of each section are written from the perspective of someone who has board experience relevant to the audience of that section. The entire manual is 160 pages long, and its developers ask that proper credit be given when parts of the guide are copied, but state that they intended it to be used and shared with others.

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Burdett, Carol; Hartnett, Johnette; Lacroix, David, and Richards, Julie (199?).
Boards of the Future! Participatory Guide and Companion Text.
For copies and alternative formats contact:
Vermont Developmental Disabilities Council
103 South Main Street
Waterbury, Vermont 05671-0206
(802) 241-2612 voice/TTY
(888) 317-2006 voice/TTY

Summary:
This guide consists of two spiral-bound manuals: A Participatory Guide and Training Workshops. *The Participatory Guide for Building Inclusive Board Membership* offers an introduction to board participation and includes definitions of board-related terms, board etiquette, board roles and procedures, board responsibilities, environmental accommodations, and a list of questions adapted from Not Another Board Meeting (Gobel). This guide also includes a list of resources and a board participant evaluation section. *The Training Workshops* guide offers two workshops, each consisting of several activities that are laid out in an easily followed step-by-step format. The first workshop, *On Becoming a Board Member*, includes four activities lasting a total of 90 minutes. The second workshop, *On Being a Board Member*, includes six 60-minute modules, each consisting of several short activities organized around specific board participation topics (for example, Module 3 is about board member roles and responsibilities).

This guide was designed for use with people with disabilities and with the boards on which they participate. The intent was to provide all board members (future or present, those with disabilities and without) with the same information at the same time. The training workshop modules are designed to provide learning through collaboration and active participation, and cover broad topics that can be adapted to reflect the needs of each board.

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On Board Fact Sheet

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Resources on Building Inclusive Boards and Committees

Resource: Gobel, S., and Flynn, J. (1994). Not Another Board Meeting! Guide to Building Inclusive Decision-Making Groups (Manual).
Order Information: Oregon Developmental Disabilities, 540 24th Place, NE, Salem, Oregon, 97301-4517, (503) 945-9941 or in Oregon only (800) 292-4194.

Resource: Burdett, C., Hartnett, J., Lacroix, D., and Richards, J. Boards of the Future! (Participatory Guide and Companion Text).
Order Information: Vermont Developmental Disabilities Council, 103 South Main Street, Waterbury, Vermont, 05671-0206, (802) 241-2612 (voice/TTY), (888) 317-2006 (voice/TTY)

Resource: Pederson, E., and Chaikin, M. (1993). Voices That Count: A Presenter's Guide. (Video, Audio Tape, and Presentation Guide).
Order Information: University Affiliated Cincinnati Center for Development Disorders, 3300 Elland Ave., Cincinnati, Ohio, 45229, (513) 559-4639, (513) 559-4626 (TDD), (513) 559-7361 (fax)

Resource: Hoffman, M. (1992). Leadership Plus. (Two Training Manuals and a Pamphlet).
Order Information: Tulsa Arc, 16 E. 16th, Suite 405, Tulsa, Oklahoma, 74119-4447, (918) 582-8272, (918) 582-3628 (fax), tulsaarc@iamerica.net

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Resource: Eddy, B. A., Cohen, G. J., and Rinck, C. (1989). How to Be an Effective Board Member. (Manual).
Order Information: UMKC Institute for Human Development, 2220 Holmes, Kansas City, Missouri, 64108.

Resource: Saucier, J., Kurtz, A., Gilmer, D., and members of Speaking Up for US. (1996). Self-Advocacy for Self-Advocates: A Leadership Guide.
Order Information: The Center for Community Inclusion, Maine's UAP, University of Maine, Corbett Hall, Orono, Maine, 04461, (207) 581-1084, (207) 581-3328 (TDD).

Resource: Bradner, J. H. (1995). The Board Member's Guide. (Paperback).
Order Information: Conversation Press, Inc., Box 172, Winnetka, Illinois, 60093, (800) 848-5224, $9.95.

Resource: Obermayer, L. (1999). Tokenism. (Article). In The People First Connection, October 1999, No. 21.
Order Information: c/o Michael Bailey, Editor, People First Connection, 540 24th Place, NE, Salem, Oregon, 97301.

Resource: Obermayer, L., & Lazzara, N. (1999). Supporting People With Disabilities as Members of Citizen Boards: The Inclusive Team. (Presentation Outline).
Order information: Massachusetts Department of Mental Retardation.

Resource: People First of Washington. Officer Handbook. (Handbook).
Order Information: PO Box 648, Clarkson, Washington, 99403, (800) 758-1123.

Resource: Capabilities Unlimited/People First of Ohio. Leadership Today. (Training Manual).
Order Information: Capabilities Unlimited, Inc., 2495 Erie Avenue, Cincinnati, Ohio, 45208, (800) 871-2181 or http://brugold.com/cui.html

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Resource: Capabilities Unlimited/People First of Ohio. Using the Seven Habits of Highly Effective People.
Order Information: Capabilities Unlimited, Inc., 2495 Erie Avenue, Cincinnati, Ohio, 45208, (800) 871-2181 or http://brugold.com/cui.html

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Resource: Capabilities Unlimited/People First of Ohio. Picture Library. (CD-ROM).
Order Information: Capabilities Unlimited, Inc., 2495 Erie Avenue, Cincinnati, Ohio, 45208, (800) 871-2181 or http://brugold.com/cui.html

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On Board Survey of Decision-Making Groups

This survey is to help *On Board* learn more details about your group's decision-making bodies. Please answers the questions openly as your answers are intended to help us better support you, not as a means to exclude or judge your group's participation in this project.

1) Name and Type of Group (i.e., board, committee, or congregation council):

_____

2) Contact Person/Mailing Address:

_____

3) General Group Information:

a) Number of members? _____

b) How often do you meet (monthly, weekly, etc.)?

_____

c) Meeting times? _____

d) Day(s) of week of meeting? _____

e) Length of meeting? _____

f) Place of meeting? _____

g) Member attendance requirements? _____

4) Profile of Group:

a) Length of group terms? _____

b) **Time of next upcoming opening(s) (please indicate type of positions, e.g., chair, general members, secretary, etc.)?**_____

_____

_____

c) Group's composition? (e.g., consumer, parent, fund-raiser, clergy, lawyer). Please provide some details (no personal information necessary).

_____

_____

_____

_____

d) Group positions? (e.g., president, general members, secretary)

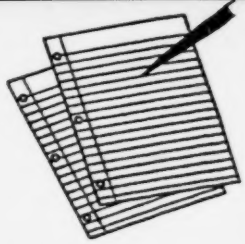
_____

_____

e) Subcommittees? If relevant, please describe in some detail. To be on your group, must a person be served by, or a member of, your congregation, agency, or community group?

_____

_____



Meeting Accessibility:

a) Would you be willing to have a member from *On Board* assess your meeting location for accessibility? _____

b) Architectural accessibility for building, meeting rooms, and bathrooms: Are there wheelchair parking zones, curb cuts, ramps, push-button doors, widened doors, elevators, raised numbers in Braille in elevators, speaking-elevators, visible directions to meeting room (raised or picture signs), and bathrooms bars grips?

_____

_____

_____

_____

c) Can the meeting room be rearranged if needed (for example, is there movable furniture)? If not, is relocation of meeting location possible?

_____

d) Alternate formats of materials: Could you provide, if needed, large print, floppy disks, audiocassettes, and/or Braille?

_____

_____

e) Other supports: Could you provide, if needed, interpreters, note-takers, transcribers, readers, debriefers, etc.?

_____

_____

f) Are you willing to provide transportation to and from meetings?

_____

g) We are prepared to provide support to help you make your meetings accessible. What supports would you like, be they on-going, temporary, or occasional?

_____

_____

6) Meeting Protocol: Please describe, in some detail, the organization of your meetings For example, do you send out preview materials prior to meetings? Do you start by a check-in, or perhaps by reading the minutes? Do you use consensus or quorum to arrive at decisions?

_____

_____

_____

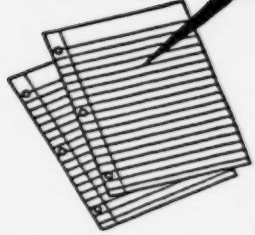
_____

7) Selection Process: What is the selection process for prospective members?

_____

_____

_____



8) New Member Orientation: How are new members oriented to your group? For example, are new members given an information package with copies of the last minutes? Do you have a ceremonial welcome? How do you orient new members?

_____
_____
_____
_____
_____

9) Support for Board Members:

a) Would your group be amenable to having personal attendants or other support persons present at your meeting?

_____

b) Can natural supports from members be generally available to members with disabilities (alone or in any combination with other support persons)?

_____
_____
_____

10) Are there other group activities? (e.g., retreats, fundraisers, brunches, and/or dinners):

_____
_____

11) Have you sent us these items (if applicable):

a) Mission statement? _____
b) Set of bylaws? _____
c) Board process policy (nominating and qualification policy, etc.)?

_____

d) Introductory materials for new board members?

_____

Thank you, we appreciate your time!

PLEASE RETURN THIS SURVEY TO *ON BOARD* IN THE ENCLOSED RETURN ENVELOPE BY

April 10, 2000

On Board Fact Sheet

6 A Curriculum for Learning to Serve on Boards and Committees

As part of the *On Board* project we have been running sessions of classes–or what we call "meetings"–for people with disabilities to learn how to serve on boards and committees. These boards might be of disability agencies, community groups, or congregations. At present we are half way through our second session of bi-weekly meetings. Based on our first session, we revised the meetings' curriculum to be as follows. At the start of each meeting we do an attendance call and read over the agenda for that meeting (as some boards do also). As you read through this curriculum please remember that these are just suggestions for meeting topics.
Meeting Number

1) Introduction – What Is a Board? In this first class we start off by having members introduce themselves to each other and get to know each other a bit, we talk about transportation for getting to meetings (we have transportation stipends available) to make sure students have the support they need to makes travel arrangements. We then discuss what a board is and make a definition from this (handed out in the second meeting). Finally, students talk about what sort of boards on which they might like to serve.

2) How Board Meetings Are Run Here, general information on how boards run, making motions, and voting are discussed. We also talk about the different types of boards and do role plays of the general run of a board meeting.

3) Questions to Ask Boards and Yourself Before Joining (2 part meeting). A discussion on questions to ask boards and yourself before you apply to join.

4) (as in meeting #3) After these two meetings we type up the students ideas of questions and hand them out.

5) About Yourself In this meeting students make personal profiles for boards. We find support people to work with students alone or in pairs to assist them in making their profiles. We also use a general questionnaire to help students think about what they might like to put in their profile.

6) Being an Effective Board Member Presentation In this meeting, students learn about and discuss how to be an effective board member including issues like privacy, assertiveness, and tokenism.

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7) **Working with a Support Person** A discussion on getting support as a board member.

8) **My Support Plan** In this meeting students make their own support plans. These support needs are added to the profiles to make a resume of the student to give to potential boards.

9) **Review & Board Profiles** We begin to find boards for students by revisiting what we have learned and going through profiles of boards that have shown interest in having a member with a disability.

10) **Where Do We Go from Here?** In this last meeting we talk about ways students can support each other after the meetings are over, while they wait to get on boards, and once they get on boards. In the last session of meetings, for example, the students decided to share their phone numbers.

Other Parts of the Curriculum

- Each student is given a class folder at the first meeting with a topic schedule within.
- Color code the handouts for each meeting/topic and list the colors on the schedule. This makes is easier for people to find which handouts they need to follow along.
- Do a lot of role plays and use game cards with questions about boards.
- Guest speakers – we try to have a guest speaker every other meeting. Speakers include community members with and without disabilities who have been on boards, board presidents, and past students.

Resources

Gobel, S. & Flynn, J. (1994). Not Another Board Meeting! Guides to Building Inclusive Decision-Making Groups. -- The Oregon Developmental Disabilities Council. A tool for self-advocates, support persons, and board members, with separate materials suitable for making overhead transparencies for training for each group separately or all together.

Pederson, E. & Chaiken, M. (1993). Voices That Count. Capabilities Unlimited, Inc.
-- A video, audio-tape, and accompanying manual that assist self-advocates in learning skills relating to membership on boards and committees.

Eddy, B., Cohen, G., Rinck, C., and Griggs, P. (1989). How to Be an Effective Board Member. University of Missouri-Kansas City. -- Two manuals, one for self-advocates and one for facilitators, that provide information on board member skills such as rules of order, motions, voting, assertiveness, board member responsibilities, and how to prepare for a meeting.

People First of Washington. Officer Handbook. -- Although this handbook is geared toward self-advocacy meeting,

The preparation of this fact sheet was supported in part by the Center on Human Policy, School of Education, Syracuse University, through a subcontract with the Research and Training Center on Community Living, University of Minnesota, supported by the U.S. Department of Education, Office of Special Education and Rehabilitative Services, National Institute on Disability and Rehabilitation Research (NIDRR), through Contract No. H133B980047, and in part by the National Resource Center on Supported Living and Choice, Center on Human Policy, School of Education, Syracuse University, through the U.S. Department of Education, Office of Special Education and Rehabilitative Services, National Institute on Disability and Rehabilitation Research (NIDRR), through Contract No. H133A990001. Members of the Center are encouraged to express their opinions; however, these do not necessarily represent the official position of NIDRR and no endorsement should be inferred.

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How do the citizen and the organization come together?

Over the duration of ***Lead the Way*** **Leadership Development Program,** the students will be matched with the appropriate organization and mentor. Upon completion of the training course, the students will participate in a formal graduation ceremony.

How does a potential candidate apply?

Contact Suzan, Director of Leadership Education at 836-0822, Extension 118 to schedule an interview.

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The Independent Living Center will

LEAD the WAY

to

Board Training for individuals with developmental disabilities.

Developmental disabilities are a variety of conditions that become apparent during childhood, or have a variety of causes, which can occur before, during or after birth. These conditions and causes include:

Autism
Cerebral Palsy
Developmental Delay
Epilepsy
Learning Disabilities
Mental Illness
Mental Retardation
Neurologically Impaired
Physical / Orthopedic
Spina Bifida
Traumatic Brain Injury.

Independent Living Center's

LEAD the WAY

LEADERSHIP DEVELOPMENT PROGRAM

Board Training for Individuals with Developmental Disabilities

The Western New York Independent Living Project, Inc.
3108 Main Street
Buffalo, New York 14214-1384
(716) 836-0822

LEAD the WAY LEADERSHIP DEVELOPMENT PROGRAM

Who offers this training program?

***Lead the Way* Leadership Development Program** is administered by the Independent Living Center (ILC) and is funded by the New York State Developmental Disabilities Planning Council.

Who is this training program for?

This program is for individuals with a Developmental Disability (DD) over the age of twenty-two, with a desire to be active within the community. They must live in Erie or Niagara County.

What is this training program?

Lead the Way provides students with 57 hours of training in preparation for involvement on a Board of Directors or Planning Council of various organizations in Erie and Niagara Counties. These organizations either provide services and programs for, and/or influence the direction and future of resources targeted to, persons with Developmental Disabilities.

What training topics are covered?

- Board Development
- Management Techniques
- The Art of Advocacy
- Public Relations
- Disability Laws
- Resume Development
- Other topics identified by the participating organization

When do the students meet?

The board training classes are to meet every week on Tuesdays, from 2:00 to 5:00 PM. This training will run for approximately five months.

When does the training program begin?

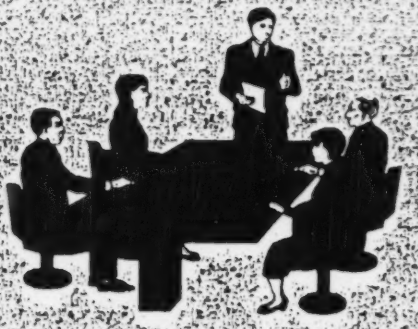
The training classes are projected to start the first week in May 2001.

Where are the training classes?

The training classes will be held at the WNY Independent Living Project at 3108 Main Street near Highgate Avenue in Buffalo's University Heights District. There will be limited free transportation available by request on an as need basis.

Why participate in this training program?

The organization can demonstrate its sensitivity to its consumers with developmental disabilities by affording graduates of this program a voice on its Board of Directors or Planning Council.



The individual has an opportunity to develop and build skills in advocating for the DD population through communications, management and responsibilities, and self- awareness.

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GOALS OF THE PROGRAM

The objective of this program is to offer basic training to people with developmental disabilities so they may sit on the board of directors and committees. By doing this, the program will increase their independence though self-advocacy, improve those services provided to others, and demonstrate that people with developmental disabilities can make a valuable contribution to society

AIM

PROMOTING LEADERSHIP OPPORTUNITIES FOR PERSONS WITH DEVELOPMENTAL DISABILITIES

FOR MORE INFORMATION CALL:

AIM
2028 LAKE ROAD
ELMIRA, NY 14903
PHONE: 607-733-3718
FAX: 607-733-0180
EMAIL: EAIMOFFICE@STNY.RR.COM

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WHAT IS THE PROMOTING LEADERSHIP PROGRAM?

AIM has received a grant from the New York State Developmental Disabilities Planning Council (DDPC), and working with Capabilities Unlimited, Inc. through the Technical Assistance Center of Syracuse University, will offer a training program to develop the skills needed to become a board or committee member.

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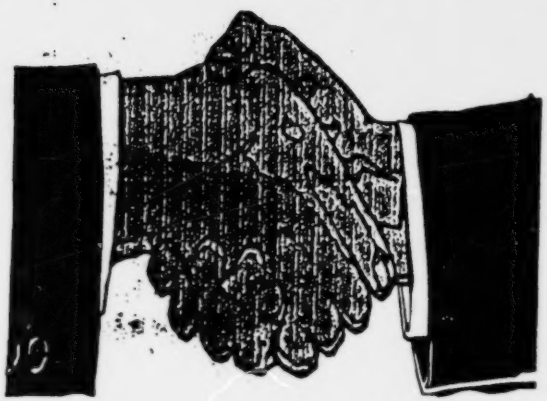

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WHAT TYPE OF TRAINING WILL I RECEIVE AND WHAT IS THE COST?

Capabilities Unlimited, Inc. is offering a two-day training program based on the methods of Stephen Covey's Seven Habits of Highly Effective People. You will learn how to work as a team, strategies to make meetings friendly, personal and interpersonal skills to improve leadership effectiveness and more. The cost of the training program, lodgings, transportation and meals are covered by the grant.

HOW WILL I GET ON A BOARD, AND WILL I HAVE ANY SUPPORT AFTER?

Candidates will be pre-screened for interest, skills and abilities to function as a member of a board. A match will be made with the prospective candidate and agencies in the area. Placement is based on open board seats and the time of appointment the agency has for new board members. A mentor will be provided.

Useful Resource Materials on Board Inclusion

Gobel, S. (1995). Not another board meeting! Guides to building inclusive decision-making groups. Oregon: Oregon Disabilities Council.

Hoffman, M. (1992). Leadership plus—Facilitators manual. Tulsa, OK: Tulsa Arc.

Hoffman, M. (1992). Leadership plus—Participant's manual. Tulsa, OK: Tulsa Arc.

Walker, P., Edinger, B., Willis, C., Kenney, M. E. (1998). Beyond the classroom: Involving students with disabilities in extracurricular activities at Levy Middle School. Syracuse, NY: Center on Human Policy, Syracuse University.

The Center on Human Policy's Website: http://soeweb.syr.edu/thechp/chpact.htm

Where is it happening?

1. **The Arc of Orleans County**, 122 Caroline Street, Albion. **Contact: Rita Gunzelman, (716) 589-0305**
2. **The North Country Center for Independent Living Inc**, 102 Sharron Avenue, Plattsburg. **Contact: Robert Poulin, (518) 563-9058**
3. **The Access to Independence and Mobility ILC**, 271 E. First Street, Corning. **Contact: Beth Redman, (607) 733-3718**
4. **The New Horizons Resource Inc.**, 21 Van Wagner Road, Poughkeepsie. **Contact: Tom McCluskey, (914) 473-3000**
5. **The Western New York Independent Living Project, Inc.**, 3108 Main Street, Buffalo. **Contact: Susan Kahaly, (716) 836-0822 Ext. 118**
6. **Allegany Arc**, 240 O'Connor Street, Wellsville, **Contact: Mark Corwine, (716) 593-5700**
7. ***OnBoard***, Center on Human Policy, Syracuse University. **Contact: Babette Morgan-Baker, (315) 443-2116**

The Technical Assistance and Resource Center (TARC), located at the Center on Human Policy, Syracuse University, supports and provides oversight to the 7 Promoting Leadership Projects. Contact: Bonnie Shoultz, (315) 443-4323 Cheryl Spear or Esther Kabuga, (315) 443-1398.

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BOARD INCLUSION

TARC
Technical Assistance & Resource Center
805 S. Crouse Ave.
Syracuse University
Syracuse, NY
13244-2280
315-443-1398
315-443-4338 Fax

Board Inclusion

What is it?

It is a process of promoting true participation of persons with developmental disabilities in decision-making bodies like boards and committees.

Why board inclusion?

- In order to enhance community representation of persons with developmental disabilities— a strong community taps the strength of every member.
- Many persons with disabilities are interested in community organizations in a leadership capacity.
- Many persons with developmental disabilities have expertise to contribute to their communities.
- It is important for persons with developmental disabilities to be part of the bodies that make policies that affect them.
- This process assists boards and committees of community agencies to improve the overall ability to understand support and include persons with disabilities in their communities.
- By undertaking this process boards act as constructive agents for change, thus challenging the status quo.

Who is involved?

- The New York State Developmental Disabilities Planning Council has funded 7 projects all over the upstate New York area to promote board inclusion.
- Technical assistance and evaluation of progress of the 7 projects is provided by the Technical Assistance and Resource Center (TARC) at the Center on Human Policy, Syracuse University.

How?

There are 4 major steps to board-inclusion?

Step 1—**Community Development**

- Sending out surveys and other outreach mailings to local decision-making groups.
- Continuing to identify interested individuals and organizations.
- Development of individualized selection and matching criteria.
- Assessment of support available through each decision-making body.

Step 2—**Consumer and organization selection/ matching**

- Sending out surveys and other outreach mailings to Self-Advocates.
- Continuing to identify interested individuals and organizations.
- Development of individualized selection and matching criteria.
- Assessment of support available through each decision-making body.

Step 3—**Training**

Developing training curricula

- Training of persons with developmental disabilities about:
  - What a board or committee is
  - The roles of a board member
  - How to be an effective board member
  - How boards are run (board procedures and etiquette)
  - How to work with a support person in order to fully participate.
- Training of agency directors and representatives of decision-making bodies about how to include a person with a disability as a real member and not just as a token
- Training of mentors

Step 4—**Technical Assistance**

- Assisting organizations in making materials and meetings accessible to the persons with disabilities.
- Assisting organizations as they help support people and board members to learn about their roles.
- Assisting organizations in the areas of recruitment, transportation, etc. as well as to overcome any barriers to inclusion that may exist.

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Allegany Arc VOICE Advisory Leadership Project

Questionnaire Survey:

Organization: _____
Address: _____
_____
Phone #: _____
E-Mail: _____
Contact People: _____
_____

What does your Organization do?

_____
_____
_____
_____

What are your Volunteer Needs:

_____
_____
_____
_____
_____
_____
_____
_____

Do you know of other Leadership and Volunteer Opportunities in Allegany County?

_____
_____
_____
_____

Do you see this connection working with your organizations needs?

Are you interested in attending the March Training with Capabilities Unlimited?

Any additional comments, suggestions or ideas you would like to share?

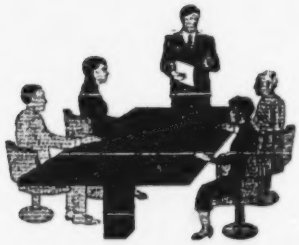
_____
_____
_____
_____
_____

Thank you
Allegany Arc Voice Advisory Board

VOICE Fact Sheet

II

About *VOICE*



What is the Purpose of *VOICE*?
The purpose of VOICE is to promote the membership of people with disabilities on agency, community, and congregation decision-making boards and committees. Coupled with identifying other volunteer needs and opportunities which individuals with disabilities can give back to their communities.

How Does *VOICE* Work?
There are four basic components of *VOICE*:

- Community Development

Members of the *VOICE* staff will work with agencies, community groups, and congregations, and person with disabilities to identify those who have an interest in participating in this project. *VOICE* is a collaborative project designed toward creating a more inclusive community; therefore, we also want to hear your thoughts, ideas, and concerns. Several opportunities are being planned. Please contact us to share your ideas.

- Making Matches

Members of *VOICE* help match interested people with disabilities with boards and other volunteer needs in our communities. We do this by learning about the board's own criteria for its members, specific volunteer needs, their needs for supporting people with disabilities, and by working with individuals with disabilities who have attended training meetings to learn how to be on boards. *VOICE* works to pair boards and people with disabilities that complement each other.

- Training

Since January of 2000, VOICE has been meeting on a regular basis. The VOICE Advisory Board was established in October. This Decision Making body will be assisting Allegany Arc in it's ongoing Mission of assisting individuals with disabilities and their families. Establishing specific training needs based on this board's responsibilities have been ongoing. Some of the training topics have been on Confidentiality, Personal vs. Public Concerns, Parliamentary Procedures, Leadership, The Seven Habits of Highly Effective People. Upcoming training is scheduled which includes Capabilities Unlimited, with continued support from the Center on Human Policy at Syracuse University and the Developmental Disabilities Planning Council. Specific individualized training needs for community organizations will be researched based on needs. Continued training and assistance with the VOICE Advisory Board remains ongoing.

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About *VOICE*

- Ongoing Technical Assistance and Support

An important aspect of *VOICE* is that it will provide ongoing technical assistance and consultation. *VOICE* will help with problem-solving around specific issues that may arise. *VOICE* also provides consultation services geared toward encouraging interactions that benefit all the board/committee members allowing the meetings to run smoothly and individuals with disabilities to enhance the work of the organization.

How Can You Get Involved with *VOICE*?

For more information about *VOICE* please contact the VOICE Advisory Board advisors Cindy Wickstrom, Tracy Lehman or Mark Corwine at:

VOICE c/o Allegany Arc
240 O'Connor Street, Wellsville, NY 14895
Tel: 716-593-5700, Fax: 716-593-4529
e-mail: cindywickstrom@hotmail.com or mhcorwine@hotmail.com

WNY Independent Living Project, Inc.
3108 Main Street
Buffalo, NY 14214-1384
(716) 836-0822 (Voice/TDD)

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PUBLIC SERVICE ANNOUNCEMENT

For Immediate air play
(February 28, 2001)
Kill date: April 15, 2001
Time: 30 seconds
Contact: Ernest K. Churchwell
at 836-0822. Ext. 125

Erie and Niagara County residents with developmental disabilities, over age 22, who wish to have a stronger voice in the organizations that serve them, are being sought by the Independent Living Center in Buffalo for its "Lead the Way" Leadership Development Program. Those accepted will be given five months of weekly afternoon training classes on the skills needed to participate in an agency's Board of Directors or other policy-making body, while appropriate host organizations and mentors are recruited. Anyone interested in the program, projected to begin in early April, should call the Center at 836-0822.

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WNY Independent Living Project, Inc.
3108 Main Street
Buffalo, NY 14214-1384
(716) 836-0822 (Voice/TDD)

PUBLIC SERVICE ANNOUNCEMENT

For Immediate air play
(February 28, 2001)
Kill date: April 15, 2001
Time: 15 seconds
Contact: Ernest K. Churchwell
at 836-0822. Ext. 125

Erie and Niagara County residents with developmental disabilities, over age 22, who wish to have a role in the Boards of the organizations that serve them, are being sought by the Independent Living Center in Buffalo for its "Lead the Way" Leadership Development Program. For details on the early April program, call the Center at 836-0822.

WNY Independent Living Project, Inc.
3108 Main Street
Buffalo, NY 14214-1384
(716) 836-0822 (Voice/TDD)

PUBLIC SERVICE ANNOUNCEMENT

For Immediate air play
(February 28, 2001)
Kill date: April 15, 2001
Time: 10 seconds
Contact: Ernest K. Churchwell
at 836-0822. Ext. 125

Erie and Niagara County residents with developmental disabilities, who wish to join organizational Boards, should call the Independent Living Center in Buffalo about its "Lead the Way" Leadership Development Program at 836-0822.

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Tips to keep in mind when working with an individual with a disability

1. It is an honor and a commitment to be on a ~~Bard~~ Board of Directors-individual must be motivated and willing to participate.

2. Be straight forward when talking to an individual with a developmental disability. Don't assume things. If something they are doing is inappropriate-tell them privately in a respectful manner. Don't assume they will just "get" it. They won't.

3. The individual on your board should be productive. If the person is not productive for any reason-get help. Capital Leaders can help, ask individuals staff member of family member for suggestions. Please don't let a board member just sit there. You are not helping the individual or your board.

4. The individual chosen is an expert in the services you provide-treat him/her like every other member of the board. Do not raise of lower your expectations of the appointed individual-expect of them what you would expect of others.

5. Do have a mechanism in place after a meeting for a mentor to go over the last meeting and discuss the next meeting to make sure the individual comprehends the events that occurred. Complex issues may need extra attention.

6. Try to be aware of your language. Try to keep language simple and concrete. This will probably help all members comprehend better.

7. The individual may ask many questions, ask you to slow down, get off topic or ask seemingly irrelevant questions. It may be a sign they do not comprehend the information. Some one may want to take them aside if it is impeding the meeting.

8. Who ever is chairing the meeting be aware that the individual may want to share but is a bit intimidated by the level of conversation. You may want to ask the individual if they have any questions or want to say anything before a vote.

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JOB DESCRIPTION FOR MY SUPPORT PERSON

Important information about me: _____

_____

_____

Desired qualities in a support person: _____

_____

_____

Time commitment: I need a support person to be available about ___ hours every

___ week ___ month

The times I need the support person are

___ weekday mornings ___ weekday afternoons ___ weekday evenings

___ weekend mornings ___ weekend afternoons ___ weekend evenings

The place(s) I need the support person is/are

___ my home ___ Board meeting location ___ Other _____

I prefer that my support person be:

___ involved with the organization whose Board I am on

___ independent of the organization and its Board

Things my support person needs to do

BEFORE THE MEETING

___ Help me review minutes, agenda, other materials provided by the Board

___ Help me prepare materials or statements I will give to the Board

___ Help me with dress, grooming, and personal preparation for the meeting

___ Help me with transportation arrangements

___ Other _____

___ Other _____

___ Other _____

DURING THE MEETING

___ Help me find the room

___ Physical help getting to the room and to my seat

___ Handle materials for me

___ Read materials to me

___ Take notes for me

___ Help me understand what people are saying

___ Help other people understand what I am saying

___ Help me with food and drink

___ Help me use the bathroom

___ Help me leave the meeting if I need to

___ Other _____

___ Other _____

___ Other _____

AFTER THE MEETING

___ Help me gather materials to take home with me

___ Help me leave the meeting

___ Help me with transportation home

___ Help me review notes and minutes from the meeting

___ Other _____

___ Other _____

___ Other _____

Is there anything I want the support person NOT to help with?

_____

_____

_____

Is there anything I want the support person to give me his/her own opinion about?

_____

_____

_____

Is there anything that might happen (for example, a seizure) that would keep me from communicating at the time? If so, what should the support person do if that happens?

_____

_____

_____

DDPC LEADERSHIP TRAINING SCHEDULE

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DATE	TIME	FOR MENTOR	PRESENTER	FOR CONSUMER	PRESENTER
7/11	7 PM	History of DD	Jim Cobia	Mission/Vision Statements	Rita Gunzelmann
	8 pm	Characteristics of DD	Jim Cobia	Current Consumers on Boards	Rita Gunzelmann
7/18	7 pm	Personal Futures Planning	Pattie Kepner	Commitment, Confidentiality, Attendance & Dress	Jill Pegelow Kelly Anstey
	8 pm	Service Delivery System	Pattie Kepner	Communication & Conflict Resolution	Rita Gunzelmann
7/25	7 pm	Board Roles & Responsibilities	Jim Cobia	Board Roles & Responsibilities	Jim Cobia
	8 pm	Roberts Rules of Order	Jim Cobia	Roberts Rules of Order	Jim Cobia
8/1	7 pm	10 Commandments Video	Rita Gunzelmann	10 Commandments Video	Rita Gunzelmann
	8 pm	Communication & Conflict Resolution	Rita Gunzelmann	Anger Management	Jim Cobia
8/8	7 pm	ADA	Roger Nellist	ADA	Roger Nellist
	8 pm	Independent Living Centers	Bob Flemming	Independent Living Centers	Bob Flemming
8/15	7 pm	Americorps/ Self Advocacy	John Hider	Americorps/ Self Advocacy	John Hider
	8 pm	Human Services Council	Andy Lucyczyn	Human Services Council	Andy Lucyczyn
	8:30	County Plan	Don Colquhoun	County Plan	Don Colquhoun
8/22	7 pm	Baggage	Tina Fitzroy	Baggage	Tina Fitzroy
8/29	7 pm	Mock Board Meeting	All	Mock Board Meeting	All

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Meetings Topic Schedule

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Meeting Number Date	Title	Topic	Handout Color	Guest Speakers
1 December 6th, 1999	Introduction – What Is a Board?	General class information, getting to know each other, transportation stipends, and discussion on what is a board	red	
2 January 10th, 1999	How Board Meetings Are Run	general information on how boards run, making motions, and voting	lavender	Dick Pratt from TLS
3 January 24th, 1999	Questions to Ask Boards and Yourself Before Joining (part 1)	Discussion on questions to ask boards and yourself before you apply to join	yellow	
4 February 7th, 1999	Questions to Ask Boards and Yourself Before	Discussion on questions to ask boards and yourself before you apply to	yellow	

	Joining (part 2)	join		
5 February 21st, 1999	About Yourself	Making personal profiles for boards	blue	---
6 March 6th, 1999	Being an Effective Board Member	Presentation and discussion on how to be an effective board member including issues like privacy, assertiveness, and tokenism	tan	Bernice Shultz from CNY DSO
7 March 20th, 1999	Working with a Support Person	Discussion on getting support as a board members	orange	Jim Sinclair, Center on Human Policy,
8 April 3rd, 1999	My Support Plan	Making own support plans	white	---
9 April 17th, 1999	Review & Board Profiles	Revisiting what we have learned, boards that are out there	pink	
10 May 1st,1999	Where Do We Go from Here?	Supporting each other after this class	gold	Students from first class session

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Notes from Meetings #3 & #4

Questions to Ask Boards and Yourself Before Joining

Here are a list of questions that we came up with together to ask boards and to ask yourself before joining.

Topic	Questions to Ask Board	Questions to Ask Yourself
Thinking About Joining a Board		• Have I been a board member before? • What kind of board do I want to be on? • Do I have any experience? • Do I really want to be a board member? Why? • Am I open to learning things I don't know yet? • Am I willing to listen to others?
Applying/ Interviewing to Be on a Board	• Is the board, or some of its members, interview me? • What do I need to bring to this interview? • Will a board member sit down with me and ask me questions and answer my questions?	• Am I willing to be interviewed by a board? • Do I have someone to help me make a profile of myself for the board if I need to?

Learning About the Board	• Can I come to one or two meetings before I become a member so I can see what the board is like and how it works? • Can I do an internship with the board for a few months?	• How will I find out what the board does, who the chair person is, or how the meetings are run?
Type of Organization or Business Board Serves – Examples are synagogue, youth club, residential, vocational, recreational, advocacy organizations, citizen's group, neighborhood organization, transportation company ...	• What can you tell me about the board? • What kind of board are you? decision-making, advisory council, action committee, fund-raising group, task force, agency board, other? • What do you do on your board? • What are some of its functions?	• Is this board for me? • What skills do I have that will be useful to the board? • Am I interested in the type of service of this board?
Board's Mission or Goal(s) – Example to advocate, to educate, to fight for civil rights, to fund programs, to include families and people with	• Can I read your board mission statement?	• Do I believe in the board's premises (beliefs, ideas)? • Are their interests my interests? • Why do I want to be a member of this board? To change the way things are done, people's

disabilities, to provide services ...		perspectives, to fight for equal rights of all people, I believe what the board believes
Run of the Board Meetings	• Does the board have certain things they do before, or part of, the meeting? • How do you run your meetings? • How can I get an agenda for the meeting? • Does your board use *Robert's Rules of Order*?	• Will I be able to go along with how the meeting runs? • Do I know how to use *Robert's Rules*?
Board Rules/By-Laws	• What do your by-laws say and can I see a copy of them? • Are you allowed to talk during board meetings? (interrupt, make a motion ...) • Can I disagree with the board? • Can I bring my family members to meetings? • What happens if a board members does something against the by-laws? • Can I disagree with the board and can	• Do I agree with the board's rules? • Do I feel comfortable with the board's rules? • Can I accept some of the rules, even if don't really like them? • Can I follow all of the rules, or do some of them not work for me?

	they disagree with me? • Am I allowed to miss a board meeting?	
Confidentiality Rules	• Is the board open to the public? • Is everything on the board confidential? (Will my support person have to agree too?) • What in the meeting is confidential, and what can I discuss with other people? (What about my support person?) • Will the board members respect my privacy … my feelings … other things about me? • If the board videotapes a meeting will I have a choice about whether I am in it?	• How much information do I want shared about myself? • Will I be able to keep information confidential? • Will the confidentiality rules put me in a place of conflict of interest? • Do I think this board can respect my privacy?
Unofficial Board Rules	• What are some of the "unofficial" rules of your board? (like no swearing)	• Do I agree with these rules and can I follow the unofficial rules?
Voting	• How does the board vote? • When I can't come to the board meeting	• Will I be able to help the board make decisions? • How will I make

	but still want to vote, can I have another board member bring my vote to the meeting or send it in some other way?	decisions about what to vote for?
Board Members	• Who else is a member of this board? • Who do the other members represent? • Can I find out the other board members names? • What are the other members positions on the board – examples are treasurer and chair • Can I have their addresses and phone numbers?	• Do I know any of the other board members already? • How will I get to know the other board members? • Do I feel comfortable with other board members and their opinions? Do I respect them, do I feel they will respect me, do they seem easy to get along with or will it be a challenge, do I want to challenge them?
Board Terms	• How long is the board term? (how many years?) • How long will I be on the board?	• Is my term too long, or too short to be worth it?
Officers	• How does the board choose officers?	• Am I open to being an officer if a place comes open?
My Membership	• What will be my role on this board? Regular voting	• What role would I want to have on a board?

	member or non-voting participant? • What do I have to do as a member? Go to meetings, read reports, vote, help with fundraising, advocates and fight for people's rights, make recommendations, educate people about disability issues? • Will the board get information about me being on the board? • What is/is not my job in educating the board? • Will there be a new member orientation?	• Do I like my role? • Will my skills, knowledge, and life experiences help the board in what they do? • Can I meet all my responsibilities as a board member? • Will the board accept my skills? • Am I ready to be a member? • Will I feel comfortable at the meetings to ask questions?
People with Disabilities on the Board	• Are there other people with disabilities on this board? • Why do you want to involve people with disabilities on your board? (possible answers are because we have important skills, abilities, and knowledge that will help the board, because it is their right, because they can bring new perspectives to the	• Do I feel this board will take me seriously, or will they use me as a "token"? • Will I be comfortable on this board? • Will they listen to me? • Do I feel like they will treat me as an equal partner? • Will what I say be important to them? • Will my ideas be

	board). • Are there, or have there been, other board members with disabilities? • Can I feel comfortable on the board to speak up if I disagree with something? • Will the board listen to and honor those who don't/can't speak?(How will that happen? How will they make sure they get that person's ideas?)	taken seriously? • Will my ideas count – will board members listen to me?
Time and Length of Meetings	• When does the board meet? • How often does the board meet? Monthly, every other month, quarterly, whenever needed? • How long are the board meetings? One hour, two, half-day, all-day, weekends? • Do you do activities outside of board meetings? • If the meeting is out of town how will I get there? Will I need a place to stay? • What happens if I	• When can *I* go to a meeting? • What time of day do I have the most energy? • Is being on the board going to interfere with my schedule? • Do I have time to do this? • Can I show up to all the meetings? • Do I have time to prepare for meetings? • Do the meetings conflict with other things I would rather do? • Will I still take care

	am late for a board meeting? • Will the board make accommodations if I have to be late or too early?	of myself if I become a member of this board? • Will I be able to keep my workload balanced? • Will I get so busy that I won't be able to see my own needs anymore? • What if I make a commitment and then I don't have time?
Place of Meetings	• Where does the board meet?	• Can I get to the meeting place?
Accessibility	• Are the building and meeting rooms accessible? • Is the meeting accessible? (might want to give examples) • Is the board room accessible?	• Is the meeting place accessible to me?

Board Materials	• Will the board give me written materials? On tape, in large print, on computer disk, in Braille, in my native language, in easy to understand language • Will videos and other materials shared at meetings be accessible to me?	• How will I get materials that are accessible for me? • If I have to do this myself will that work for me?
Accommodations	• What accommodations has the board made in the past? • Am I allowed to bring my Braille machine to a meeting, even though it makes noise? • Will I get my reading materials ahead of time so I can prepare? • Will the board give me an interpreter, other accommodations? • Who will arrange accommodations? Will I have helps, how, can someone help me, can you help me think of a way to help myself?	• Will the board be able to meet my accommodation needs? • What equipment do I need to bring with me to the meeting? • Where will I keep my equipment and meeting materials between meetings?

Support Person	• Can I have a support person? • What will my support person have to agree too? • Will I have a support person on the board?	• What kind of support person do I want, can I get someone that I trust? • Will the board accept the support person?
Board Supports	• What basic supports will the board give me? • Who will arrange these supports? • Who will pay for these supports? • What supports am I supposed to arrange? Access to TTY, tape recorder …	• Will supports be there when and when I need them?
Money & Reimbursement	• Will the board pay for or help me with transportation? • Will the board pay for transportation? • What costs will the board pay for me? transportation, meals, lodging, child care, lost work time? • Will the board reimburse me? When, how fast, how much? • Who pays for me to	• Can I afford to do this? • Will being reimbursed work for me?

	go to retreats? • What things am I supposed to pay for?	
Written Materials	• Will I get materials ahead of time to prepare? Who will help me prepare?	• Do I have someone to help me prepare? • Do I have the time to prepare?
Health and Emotions	• Am I allowed to leave the meeting if I become upset? • Do I want to be on a board that argues a lot … has to make hard decisions?	• Do I have health problems that might be affected by others on the board (like if they smoke)? • Can I cope with an upsetting board or making hard decisions?

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